INDUSTRY DAY PREPARATION

Version 1.1

Briefer:

Briefing Purpose

- **Increase understanding of the purpose and benefits of conducting industry days**
- **Expand awareness of communication barriers and how to mitigate them**
- **Help exploring ideas of how to conduct effective industry days**

Briefing Outline

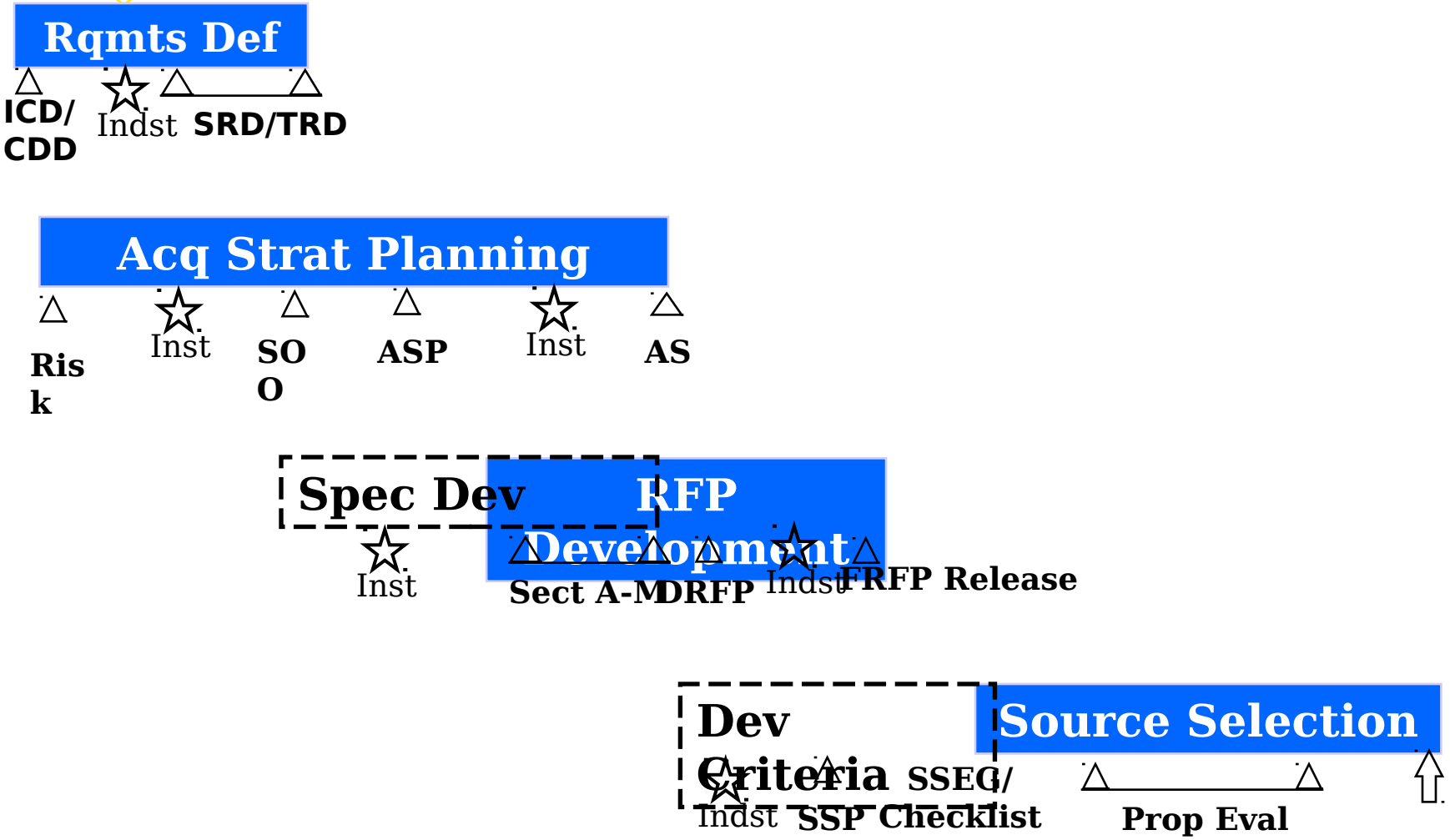
- **Purpose and Benefits of Industry Days**
- **Industry Days in the Pre-Award Process**
- **Timing of Industry Days**
- **Industry Barriers to Open Communication**
- **Mitigating Communication Barriers**
- **Different Types of Industry Days**
- **Basic Steps to Effective Industry Days**
- **Workshop: Your Industry Day**

Purpose and Benefits of Industry Days

- **Purpose:**
  - **Facilitate two-way exchanges between the Government and Industry during the acquisition development (pre-award) phase**

- **<u>Benefits</u>:**
  - **Opportunity to discuss key program issues**
  - **Provides data for informed decision-making (Govt/Ktr)**
  - **Improves likelihood of successful contract execution**
  - **Better RFPs which clearly communicate Gov’t needs**
  - **Focused, higher quality proposals**
  - **Fewer Evaluation Notices (problems & questions)**
  - **<u>More efficient source selections</u>**

Industry Days in the Pre-Award Process



Timing of Industry Days

- **Before Acquisition Strategy Panel:**
  - **Early feedback on program objectives and program risks**
  - **Potential alternative strategies, schedules, approaches**

- **After Acquisition Strategy Panel:**
  - **Feedback on acquisition strategy and acquisition schedule**

- **During development of Technical Baseline (Spec):**
  - **Feedback on specific requirements and technical risks**

- **After first Draft RFP:**
  - **Feedback on proposal instructions and evaluation criteria**
  - **Answers to specific contractor concerns**
  - **Separate PCAG and/or Cost one-on-one sessions**

Performance Confidence Assessment Group (PCAG)

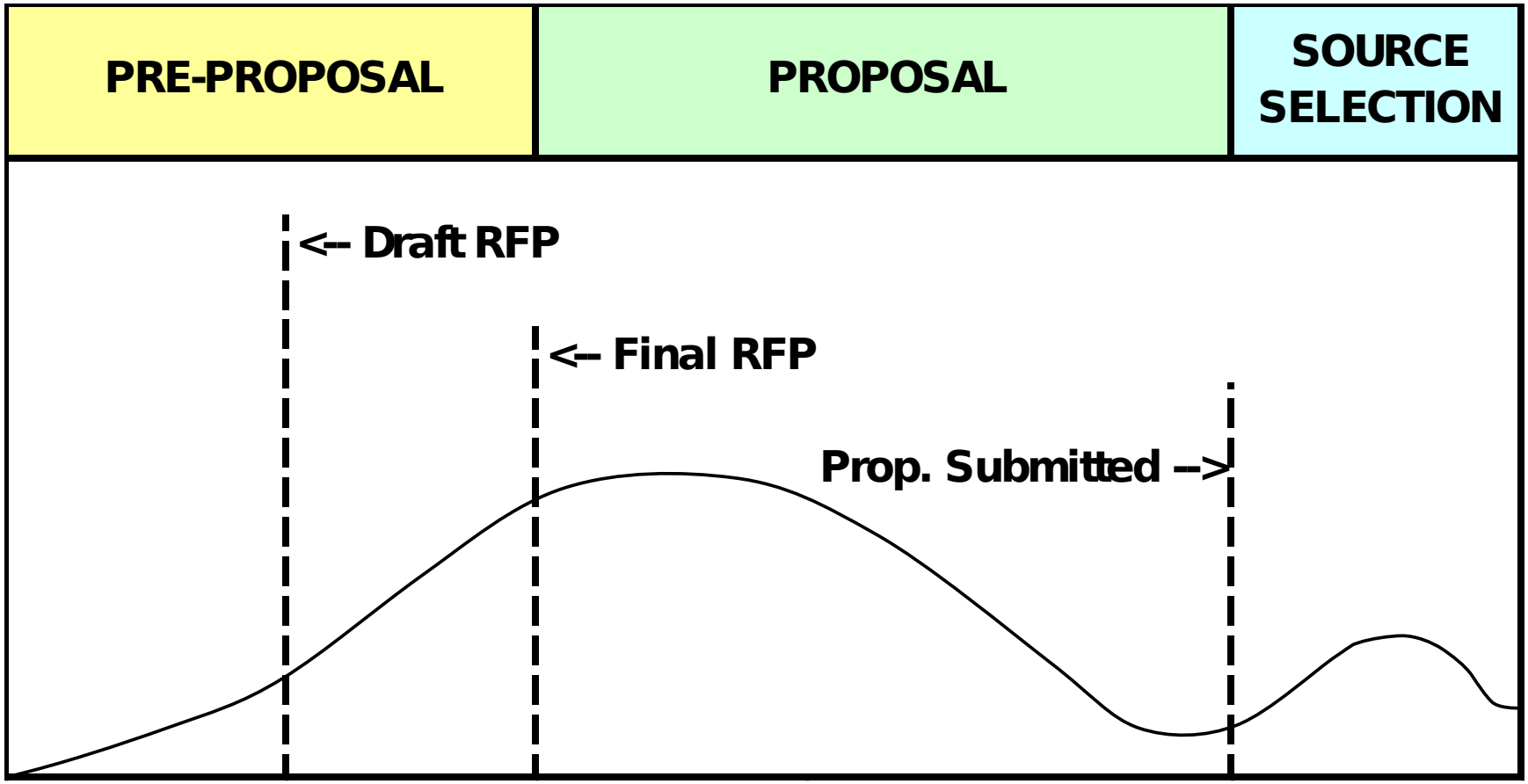
- **Treatment of Past Performance (AFFARS 5315, MP5315.304, para 4.4.1.3)**
  - **One of four mandatory Factors (MC, PR, Cost, PP)**
  - **As important as the most important non-cost Factor**
  - **Two aspects: relevance of and performance on prior contracts**
- **Challenges:**
  - **Establishing meaningful relevancy criteria**
  - **Communicating proposal instructions that facilitate evaluation**
  - **“Balance” between information requested and page limitations**
- **Lessons Learned:**
  - **Select PCAG Chair as soon as RFP development starts**
  - **Start RFP as soon as Mission Capability Sub-Factors are “stable”**
  - **Seek unambiguous industry feedback on <u>every</u> change**
  - **Best Practice: Separate one-on-one sessions to discuss past performance instructions/criteria after first Draft RFP**

Industry Barriers to Open Communication

Before asking questions, contractor's ask themselves:

- **Will asking a question or making a comment…**
  - **Divulge a competitive advantage?**
  - **Make our team look dumb, foolish, or ignorant?**
  - **Increase proposal costs? (i.e., expand proposal scope?)**
- **Can Govt. response cause us competitive disadvantage?**
- **Can a defensible assumption about the current RFP enhance our competitive advantage?**
- **Can we afford to wait for Govt. to answer?**
- **Do we know what the answer is likely to be?**
- **Additional barrier: Contractor proposal team may not include all disciplines in early phase, therefore, some questions are not asked because no one on the team to ask it yet.**

Typical Contractor Proposal Team Staffing History



Mitigating Communication Barriers

- **Provide contractors with any Govt. data needed for informed, well thought out responses**
- **Provide contractors with sufficient time to respond**
- **Ensure the Govt. is prepared at the Industry Day**
- **Give KTR enough time between release of draft and Industry Day to submit questions**
- **Ensure one-on-one with KTR for open discussions**

Different Types of Industry Days

Open Industry Session

- **Open meeting - Don't expect candid Ktr feedback!**
  - **Pros - gets same message to large audience, easier to set up**
  - **Cons - restricts feedback of industry to Govt., no assurance all understood message the same way**
  - **Best uses: explaining a new acquisition to industry, conducting a site visit, providing the same status/update to several Ktrs**

Industry One-on-One Session

- **One-on-One meetings - Ask specific questions to stimulate dialog**
  - **Pros - facilitates two-way feedback, can be customized to the audience, efficient scheduling (time/travel) for Ktr**
  - **Cons - raises issue of equal treatment, difficult to control general information provided to each Ktr, time-consuming for PO**
  - **Best uses: obtaining feedback from Ktrs, conveying feedback peculiar to each Ktr**

Different Types of Industry Days (Cont'd)

- **Combination: Open meeting followed by One-on-Ones**
  - **Pros - best way to get feedback from contractors, allows control of general information to Ktrs**
  - **Cons - most difficult to set up, most time consuming for SPO, requires careful planning to minimize travel inefficiencies for Ktr**
  - **Best use: Gov't communicates same message(s) to Ktrs in Open Meeting, then Ktrs communicate with Gov't in one-on-ones**

Gov't to Ktrs => Open meeting
Ktrs to Gov't => One-on-Ones
Two-way Discussion => One-on-Ones

Basic Steps to Effective Industry Days

1. **Determine expectations (3-5 desired results)**

2. **Determine documentation necessary to achieve expectations**
   - **Gov't to Ktr: Before meeting, at meeting, after meeting (minutes)**
   - **Ktr to Gov't: Slides at meeting, written comments after**

3. **Determine appropriate prep time for both Govt. and Ktr**
   - **Allow Ktrs time to do homework**

4. **Decide on type of Industry Day**
   - **Open meeting, one-on-one, or combination**
   - **Most of the time should be combination**

5. **Establish ground rules for the actual meeting(s)**
   - **For both Govt. and Ktr**
   - **Distribute to both Gov't and Ktr before meeting if possible**

Basic Steps to Effective Industry Days (cont'd)

6. **Determine how the meeting will be documented (minutes, action items, deferred responses, etc.)**
   - **Best Practice: Ask Ktrs to use (and provide) slides to answer your questions and focus dialog/discussions**

7. **Determine who from the Govt. team will attend**
   - **An initial list will prevent surprises**

8. **Decide on most appropriate method to invite Ktrs**
   - **FedBizOpps, WWW, letter, telecon, etc.**
   - **PCO letter or E-mail are the most common types used**

9. **Plan and execute the administrative side of the meeting**
   - **Develop a detailed plan and schedule as management tool**

Workshop: Your Industry Day

Overall Approach

- **How many Industry Days?**
- **During which phases?**
- **When is the next/first one?**

Determine Expectations

- **What are the most important results we need?**
  - **–Feedback on objectives, risks, schedule or strategy**
  - **–Alternative contract type, test approach, funding profile, etc.?**
  - **–Feedback on our most difficult technical requirements?**
  - **–Proposed list of trade studies that will need to be conducted?**
  - **–Alternative warranty/guarantee approaches?**
  - **–Comments on our pricing strategy for production phase?**
  - **–Contractor perspective on the need for a WBS dictionary?**
  - **–Problems with contract data requirements?**
  - **–Access to Govt. cost or performance models?**

Determine Necessary Documentation

Consider expectations and determine:

- **What documentation does the Ktr need?**
  - **–Technical documents (TRD/Spec comments, top risks, ORD)?**
  - **–Special clauses (Sect H), SOO, SOO elements, ASP minutes?**

- **Does the Gov't need some information from the Ktr?**
  - **–Which Ktrs want to have one-on-ones and when?**
  - **–Answers to previous questions? Results of analyses?**

- **In what form does the Govt. want the Ktr response for the meeting?**
  - **–Briefing charts (usually), enough detail to understand answer**
  - **–Full text comments, summary comments on briefing charts Soft copy of briefing charts provided at meeting?**

Determine Necessary Preparation Time

Considering expectations and documentation needed (Gov't and Ktr), determine:

- **How much time will the Ktr need to review documents, answer Gov't questions, prepare Ktr questions, etc?**

- **How much time will the Govt. need to gather the data and provide to Ktr?**

- **How much time will Govt. need to review Ktr data/questions/comments (and generate responses) prior to the meeting?**

Don't expect Ktrs to review a complex document and present detailed comments after only 2 or 3 days preparation

Determine Best Type of Industry Days

Which type of Industry Day?

- **Open Meeting?**
- **One-on-ones?**
- **Combination: Open Meeting followed by One-on-ones?**

Summary

- **Determine your expectations for <u>each</u> Industry Day**
- **Define the documentation necessary**
- **Select the appropriate type of interchange**
- **Appoint an OPR for each Industry Day**
- **Develop a detailed plan and schedule ASAP**
- **Manage to the plan and schedule**